Task and Module Descriptions

Task

- **Model Review** – Reviewing and updating Partners Model Company
- **Client Training** – Training your client on an implementation or support item that they might need assistance with
- **Partner Training** – Training Partner employees on specific modules or items
- **Implementation** – Implementing new modules for current/new clients
- **System Review** – Reviewing and/or reconfiguring a current client's setup to enhance the services/modules they are currently using

Module

- **ACA (Limited Services Provided) -** Creation of ACA Profiles and Benefit Plans needed to accurately track eligibility and affordability.
- **Accruals 1.0 & 2.0 –** Includes items such as time off types/categories, waiting periods and accrual profile configuration
- **Advanced Scheduler –** Creation of schedule cycles that meet business needs and employee availability
- **Benefits (No Carrier Connection)** – No carrier connection through Everything Benefits
- **Dashboard's -** This includes configuration within the Dashboard Tab Library as well as the Dashboard Layout Profiles
- **HR Core** – Includes items such as My Employee Information HR Actions (Base Comp Change, Job Change, EIN Transfer, etc.), Asset Tracking, Incident Tracking, Credentials, etc. When selected, the request will ask you to specify exactly what items that the client would like to implement. If nothing is selected, only the standard My Employee Information HR Actions will be configured.
- **LOA** – Leave of Absence
- **New Hire Employee Onboarding** – The build of any checklist that is needed for clients to electronically onboarding employees, ESS My Information HR Actions, and basic Hire, Rehire, and Termination HR Actions – This needs to be selected separately from HR Core, it is not included within the HR Core module selection
- **Payroll Core** – This will include a GL Build unless it is otherwise noted on the Partners Configuration Expectation sheet
- **Performance Reviews** – This needs to be selected separately from HR Core, it is not included within the HR Core module selection
- **Recruitment Plans** – This needs to be selected separately from HR Core, it is not included within the HR Core module selection
- **System Tax** – Setting up client taxes in system – This does not include filling for tax ID's or assuming what ancillary taxes are needed
- **TLM Core** – This includes configuration for all Time & Labor related profiles (Access, Holiday, Pay Calculation, Pay Prep, Timesheet Auto Population, Timesheets, Work Schedule)
- **Training** – General training; can be for the Partner or Client
  Succession Planning – Allows clients to identify employees who are leaving critical positions in a company. Clients can use this to manage employees as they progress toward a possible new role to succeed upcoming vacancies.
- **Compensation Management** – Enables clients to create Compensation Cycles, enter Budget Data, allow managers to model and propose increases for their employees using the Budget Data. Use workflows to route and approve increases.

- **Points** – This includes the configuration of the Points profile, as well as any additional configurations necessary to support the rules within the Points profile. Including, but not limited to Point Categories, Exceptions and Schedules.
- **Basic Schedules** – This includes the configuration of Daily Rules and Work Schedule Profiles.
- **General Ledger** – This includes the configuration necessary to produce an accurate General Ledger report. Depending on the client specifications, this includes but is not limited to Code entry where necessary (cost centers, earning codes, etc.), as well as General Ledger settings (formats, overrides, etc.) and custom report creation
- **Workers Comp** – This includes the configuration of Workers Comp Carriers, Policies and Codes, as well as custom report creation